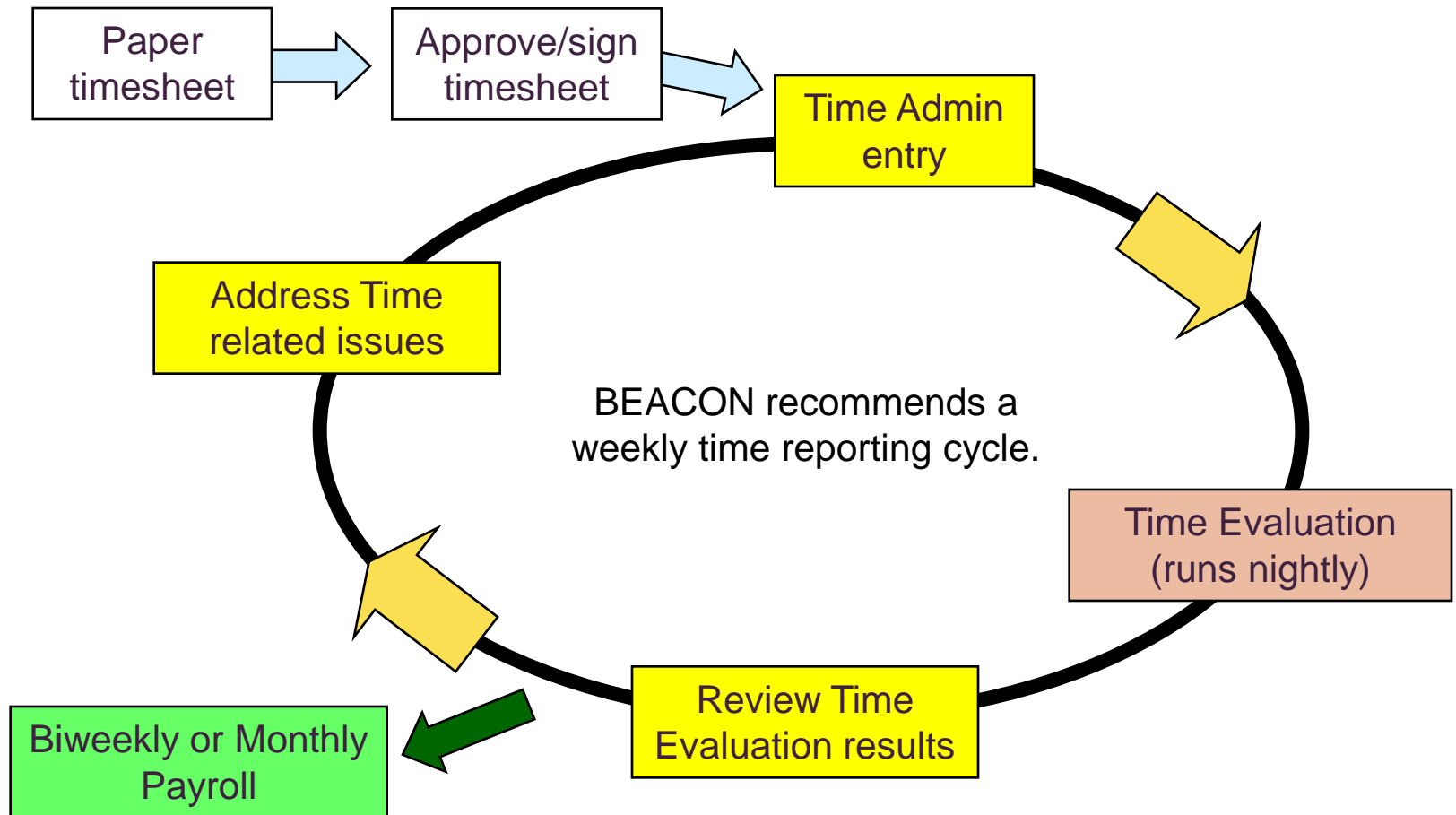


# **Quota Corrections Workshop**

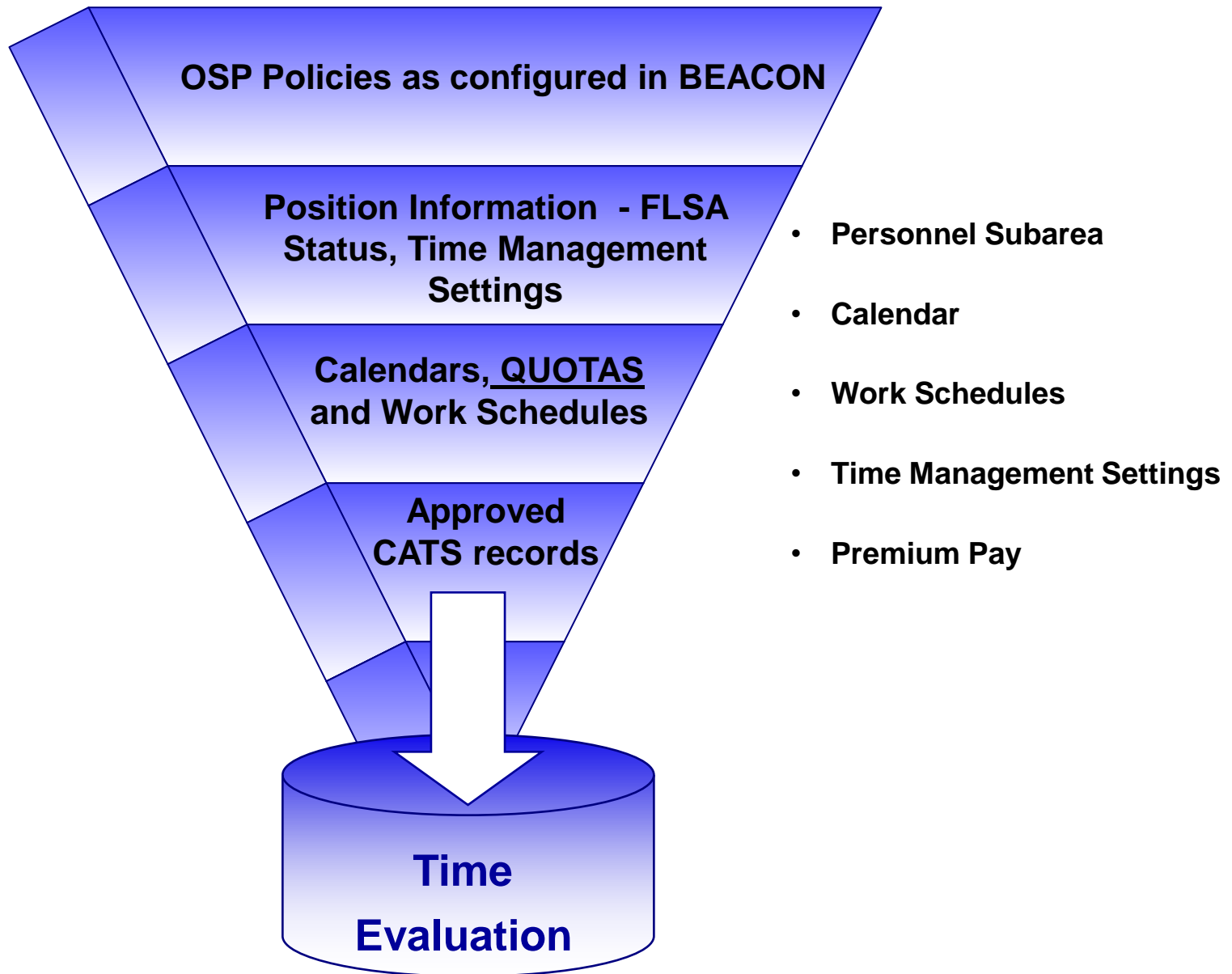
## **Time Entry Processes and Procedures**

**September 10, 2008**

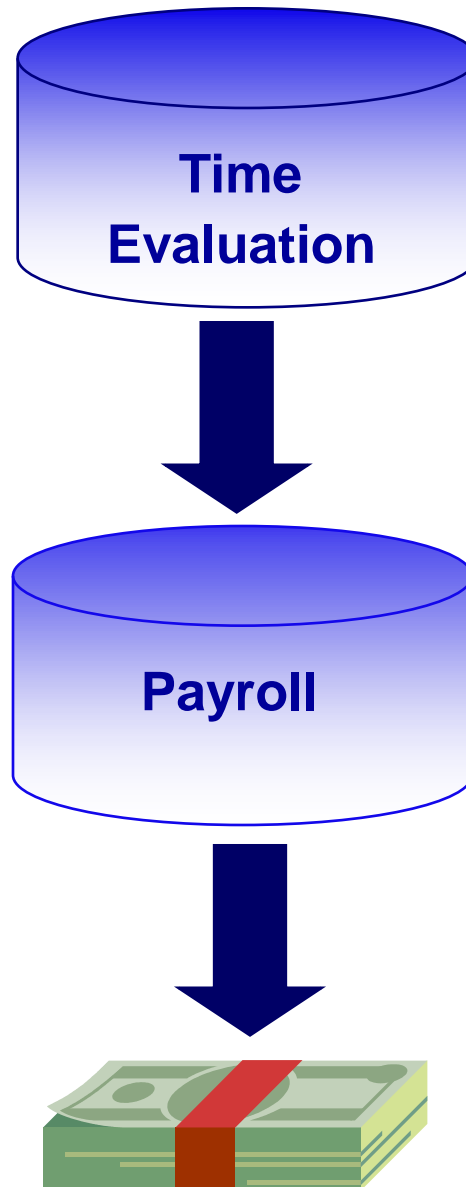
# Time Administration Process



# Time Evaluation – What Goes In



# Time Evaluation – What Comes Out



All agencies are encouraged to enter time **weekly**!

All **management** is encouraged to **approve time weekly**!

**Weekly time entry is HIGHLY RECOMMENDED BY BEACON!**

Benefits of weekly time entry:

- **Employees will receive premium pay sooner.**

Once **entered** and **approved**, premium pay will pay in the next available payroll.

- Accurate and timely leave accrual
- Up-to-date Quota Overviews
- **Reduced ADMINISTRATIVE BURDEN at the end of the period!!!**

## SAP - Cross Application Timesheet (CATS)

- Data Entry Profiles
- Key Date
- Attendance/Absence type (A/A type)
- Multiple Selections/Variants

- Failure to Release Time
  - ESS Time must be released by the employee before it can be approved by the supervisor.
  - Time Approvers may approve time if the Manager fails to do so. Time Administrators cannot approve ESS entries.
  - Time administrators can enter time in SAP for ESS users that cannot make entries. Time entered by the Time Admin on behalf of an ESS user is saved as approved time. It would be an exception to normal procedures.
- Corrections After Approval
  - Time Administrators can make approved changes.

- Entries may be corrected back to the date of Go-Live. Agency business practices will determine how far back you can go to make corrections.
- **Approved** changes are picked up the next time that Time Evaluation is run. **Time Evaluation runs nightly.**
- Only Time Administrators can change entries for ESS users **when the time has already been approved** via MSS.
- ESS users can correct time until the time is approved in MSS.



- **View Daily Target Hours – CAT2 (CAT3=Display)**

- You may view daily target hours using transaction Enter Time – CAT2

**NOTE: CAT2 does not show the work schedule rule or shift description.**

- **Display Work Schedule/Shift Description – PA61 (PA51=Display)**

- You may view an employee's work schedule rule, shift description, and any active substitutions using transaction PA61.

**NOTE: HR Master Data Maintainers are responsible for updating an employee's work schedule.**

## Employee Settings:

- The following Infotypes hold key time data specific to the employee:

Infotype #	Name	Description
0001	Organizational Assignment	Holds organizational data such as Employee Group, Employee Subgroup, and Personnel Subarea
0007	Planned Working Time	Work schedule and working hours
0315	Time Sheet Defaults	Indicates if a timesheet is required
0552	Time Specification Employment Period	Length of Service/Prior Service. Relevant to accruals

## Premium Pay Eligibility:

- Overtime Compensation Eligibility and Rate
- Night Shift Premium Eligibility and Rate
- Evening Shift Premium Eligibility and Rate
- Holiday Premium Rate and Payout
- Weekend Shift Premium Eligibility and Rate
- On Call Eligibility and Rate
- Call Back Eligibility

**NOTE:** These position settings stored on Infotypes 9005-9016 control premium pay eligibility.

# Premium Pay Eligibility Flags

- Indicated on the position rather than the employee
- A check indicates that there is eligibility information for the specified infotype

Active	Planned	Submitted	Approved	Rejected
<b>Infotype Name</b> E...				
Overtime Compensation ✓				
Holiday Payout Period ✓				
Night Shift Premium ✓				
Evening Shift Premium ✓				
Weekend Shift Premium ✓				
Holiday Premium Rate ✓				
On-Call ✓				
Callback ✓				
Time Off Balancing				
Charge Object Assignment				

**Time period**  
☒ Period  
From 08/21/2007  
☐ Today  
☐ All  
☐ From curr.date  
☐ To current date  

Select.

# Premium Pay Codes

01 – Night Premium

02 – Evening Premium

06 – Stop Premium

- Examples of Daily work Schedules:

- 1D08 Day Shift – 8 hours

- 1E08 Evening Shift – 8 hours


- 1N08 Night Shift – 8 hours

**There is no SHIFT PREMIUM CODE  
(Push Code) for Weekends.**

- Weekends

- The system always knows weekends. Weekends start with Night shifts on Friday. An employee that records work time on Saturday who is eligible for Weekend premium pay will receive weekend premium pay, without a substitution.

## Night Shift Eligibility

Position	RESEARCH AN RESEARCH ANALYST I		
Planning Status	Active		
Validity	10/17/2007	to	12/31/9999
 Display change infor			
Night Shift Premium 01 S 59901032 1			
Night Shift Prem Elig	<input checked="" type="checkbox"/>		
Night Shift Prem Rate	10	%	

# Quota Corrections

The BEACON system automatically manages an employee's accruals of various quotas, including:

- Sick
- Vacation
- Community Service
- Military Leave (if applicable)

Employees using ESS can review quotas online

Quota balances reflect the balance **as of the last time Time Evaluation was executed**. Employees recording time monthly, instead of weekly, will have balances that are not entirely current.

# Quota Types

Quota Type	Quota Text
10	Vacation Leave
15	Sick Leave
20	Overtime Comp Time
22	Holiday Comp Time
24	Travel Compensatory Time
26	On Call Comp Time
31	Advanced Vacation Leave
32	Advanced Sick Leave
40	Holiday Leave
50	Bonus Leave
61	Adv weather # hours owed
65	Community Service Leave
80	Received Shared Leave
85	Military Leave (Training)



## THE RULE:

**An employee will accrue their leave when they have achieved 50% of their payroll period.**

- Employees who are Positive Time must demonstrate that achievement by recording time.
- Employees who record only their exceptions (Negative Time) will receive their accruals based on their planned Working Time.

**NOTE:** BEACON **HIGHLY RECOMMENDS** weekly time entry to **ensure timely and accurate accruals**. Monthly time entry for Positive Time Recording EEs will cause a delay in the monthly accruals.

# Quotas – Recording Leave

- Employees accrue leave when the time has been earned based on **approved** timesheet entries. Leave may not be taken before it is earned. Time must be **entered, approved and evaluated** before the accrual will be done.
- Leave earned on the 15<sup>th</sup> may **not** be applied to an absence on the 10<sup>th</sup>.
- Quotas ~~cannot~~ **should not** be negative. Employees and Time Administrators cannot record more leave than the employee has available on that date.
- Leave Administrators have the responsibility to research Quota problems and make appropriate adjustments.

# Quota Overview Snapshot

Selection  
tab lets user  
change date  
range

Absence quotas  
tab shows quota  
balances

Accruals tab shows  
quota generations &  
adjustments

Not in  
use

Time evaluation								
70197877								
Wednesday May								
1001 Agriculture Conservation Cost Center 109999999 AGRICULT								
A1 FT N-FLSAOT Person WS rule D01N080 MTWHF-8;								
Selection dates Absence quotas Accrual information Attendance quotas								
Totals row	AbQuotaTyp	Quota text	Unit	Entitl.	Rem.	Requested	Compens.	D
Σ	10	Vacation Leave	Hours	80.00000	80.00000	0.00000	0.00000	
Σ	15	Sick Leave	Hours	80.00000	40.00000	40.00000	0.00000	
Σ	40	Holiday Leave	Hours	24.00000	24.00000	0.00000	0.00000	
Σ	65	Community Service	Hours	24.00000	24.00000	0.00000	0.00000	

- Quota adjustments can be used to:
  - Correct quota errors
  - Advance leave
  - Convert Community service leave to community service leave tutoring
  - Administer voluntary shared leave\*
- Quota adjustments are done by selecting the Quota subtype and then entering the number of hours.
- Transaction – **Maintain Time Data - PA61**
  - **Infotype 2013**
    - » Subtype 10 – Vacation
    - » Subtype 15 – Sick Leave
    - » Subtype 31 – Advanced Vacation
    - » Subtype 32 – Advanced Sick

# Quota Corrections Snapshot

Absence quota type  Vacation Leave

## Change accrual entitlement

Quota number  Hours

- ☒ Increase generated entitlement
- ☐ Reduce generated entitlement
- ☐ Replace generated entitlement

**Choose Carefully:  
Increase or  
Reduce**

**Always choose  
transfer  
immediately**

## Change transfer time

Transfer

## THE RULE:

**Leave is to cover the gap between hours worked and the minimum expected work hours.**

- When Approved Leave is taken in the same period where the employee has worked additional hours, the amount of leave taken will be offset with the additional work hours, and the leave that had been recorded will be **restored to the employees quota** for later use.

# Leave Hierarchy – Approved Leave

A/A Type  
9000



1. Holiday Comp



2. OT Comp



3. On-Call Comp



4. Travel Comp



5. Vacation



6. Bonus Leave



7. Advanced  
Leave

# Hierarchy – Sick Leave

**A/A Type  
9200**



**1. Sick Leave**



**2. Voluntary  
Shared  
Leave**



**3. Advanced Sick  
Leave**



- **Adverse Weather**

- If an employee has an outstanding Adverse Weather liability and works additional hours, the additional hours are used to pay back the liability until it is satisfied.

(Job Aid: <http://help.mybeacon.nc.gov/beaconhelp/>

[Human\\_Resources/Time/Job\\_Aids](#)

- **Advanced Leave**

- As leave is accrued, it is used to satisfy an outstanding Advance Leave liability of the same type (e.g., vacation accruals are used to pay back vacation advances).
- If an employee has an outstanding Advanced Leave liability and works additional hours, the additional hours are used to pay back the liability until it is satisfied.

- **When to change Work Schedules**
  - On the first day of the pay period
- **Why to change the first day of the pay period**
  - Calculation issues

# Useful Transaction Codes

Transaction	Description	
CAT2	Enter Time	
CAT3	Display Time	
PT50	Quota Overview	
PA61	Maintain Time Data	
	Infotype: 2013 – Corrections	
PT50	Quota Overview	
CATS_DA	Display Working Times	